



# Pension & Fiduciary

## Veterans Non-Service-Connected Pension and Survivors Pension

Pension is a needs-based benefit designed to provide certain wartime Veterans and their survivors with a minimum level of income that raises their standard of living.

Wartime Veterans who are age 65 or older or have a permanent and total non-service-connected disability, and who have limited income and net worth may be eligible. Veterans who are more seriously disabled may qualify for pension at the increased housebound or aid and attendance (A&A) rates. Surviving spouses and dependent children of deceased wartime Veterans are eligible for monthly pension benefits if they meet the net worth and income requirements.

## The Fiduciary Program

The Fiduciary program provides oversight for VA's most vulnerable beneficiaries who are unable to manage their own VA benefits. Upon appointment by VA, a fiduciary is authorized to receive direct payment of a beneficiary's VA benefits and to disburse funds to creditors and the beneficiary according to the best interests of the beneficiary.



**3 Pension Management Centers**  
**288,710 Veterans and**  
**202,975 Survivors**  
**Receive Pension**  
**Benefits**

### A note on the data:

**The 2016 Annual Benefits Report is based on data from the VBA corporate database.**

**The availability of gender and age data is limited as some records have no gender or birthdate available. Those records are accounted for in the totals for each table but not in the category columns. Please see footnotes for additional information.**

**The Old Law Pension Program and Section 306 Pension Program are closed to new applicants. The term "Other Pension" is used to reference them.**

**Please see the section on page 2: "A Note on How the FY 2016 Pension Data is Presented" for important information on the color coding of the data tables.**

**Data regarding the fiduciaries of Veterans and survivors receiving VA benefit payments are stored in the Beneficiary Fiduciary Field System (BFFS) while data regarding claims, benefit types and award amounts for fiduciary related records are stored in the VBA corporate database.**

**Information on the fiduciary program begins on page [20](#).**



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## A Note on How the FY 2016 Pension Data is Presented

### New to the Rolls

Individuals who began receiving pension during fiscal year 2016 (October 1, 2015 to September 30, 2016) are considered “new to the rolls” and the tables are outlined in purple.

### On the Rolls

All individuals who are receiving pension on September 30, 2016 are considered “on the rolls” and are outlined in tan.

These tables include “new to the rolls” recipients.

The Office of Performance Analysis and Integrity is available to answer questions regarding the data contained in this report by email at [PAI.VBACO@va.gov](mailto:PAI.VBACO@va.gov).

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#### Release history

Version & Changes	Date
Version 1.0	02/06/2017



**VA**



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## Pension Programs

### Pension Benefits for Veterans

Wartime Veterans who meet one or more of the following basic eligibility criteria may be entitled to pension benefits:

- Permanent and total disability from non-service-connected causes.  
Veterans are considered permanently and totally disabled if they are:
  - A patient in a nursing home,  
or
  - In receipt of Social Security disability benefits,  
or
  - Unemployable due to disability as determined by VA.
- 65 years of age or older

Entitlement is subject to income and net worth limitations. Additional amounts may be paid to Veterans who have dependents or who, due to disability, are in need of the aid and attendance (A&A) of another person or are housebound.

### Pension Benefits for Surviving Spouses

Surviving spouses of wartime Veterans have basic eligibility for survivors pension if they meet the income and net worth limitations. Additional amounts may be paid to surviving spouses who have dependents or who, due to disability, are in need of A&A of another person or are housebound.

### Pension Benefits for Surviving Children

Surviving children of wartime Veterans have basic eligibility for survivors pension if they meet income and net worth limitations and are:

- Unmarried, and
  - Under the age of 18 years,  
or
  - Between the age of 18 and 23 years and attending an accredited school,  
or
  - Became permanently incapable of self-support prior to reaching 18 years of age.

## Special Monthly Pension: Aid and Attendance and Housebound

Veterans and survivors who need the A&A of another person or are housebound may be eligible for additional amounts of pension called special monthly pension. Because pension at the A&A and housebound rates is based upon a higher income limit, claimants ineligible for basic pension due to excessive income may be eligible for pension benefits if they are determined to need A&A or are housebound.

### Aid and Attendance (A&A)

- Veterans or surviving spouses may be eligible for pension at the A&A rate if:
  - They require the assistance of another person in order to perform activities of daily living, such as bathing, feeding, dressing, toileting, adjusting prosthetic devices, or protecting themselves from the hazards of their daily environment,  
or
  - They are bedridden, in that their disability or disabilities require that they remain in bed apart from any prescribed course of convalescence or treatment,  
or
  - They are a patient in a nursing home due to mental or physical incapacity,  
or
  - They have corrected visual acuity of 5/200 or less in both eyes, or concentric contraction of the visual field to 5 degrees or less.

### Housebound

- Veterans may be eligible for pension at the housebound rate if:
  - They have a single permanent disability evaluated as 100-percent disabling and,
  - Due to a disability or disabilities, they are permanently and substantially confined to their immediate premises,  
or
  - They have a single permanent disability evaluated as 100-percent disabling and another disability or disabilities, independently evaluated as 60-percent or more disabling.
- Surviving spouses may be eligible for pension at the housebound rate if disability or disabilities permanently and substantially confine them to their immediate premises.

### Old Law and Section 306 Pension

Old Law and Section 306 Pension for Veterans and their surviving spouses and children use laws and regulations different from the current pension program to determine entitlement and the amount of monthly benefits. VA does not accept any new applications for benefits under these older programs. If a beneficiary loses entitlement to Old Law or Section 306 Pension due to changes in circumstances (for example, a change in income), the beneficiary must establish entitlement under the rules of the current Veterans pension or survivors pension program.



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## Quick Reference: Recipients and Amounts by Program

### Totals – new recipients

Veterans who began receiving pension benefits	37,027
Survivors <sup>1</sup> who began receiving pension benefits	33,734
<b>Total</b>	<b>70,761</b>

### Estimated annual amounts paid – new recipients

Benefit program	Number of recipients	Estimated average individual amount paid annually	Estimated total amount paid annually
Veterans Pension	37,027	\$13,858	\$513,114,950
Survivors Pension	33,734	\$10,750	\$362,656,573
<b>Total</b>	<b>70,761</b>	<b>\$12,376</b>	<b>\$875,771,523</b>

### Totals – all recipients

Veterans receiving pension benefits	288,710
Survivors receiving pension benefits	202,975
<b>Total</b>	<b>491,685</b>

### Estimated annual amounts paid – all recipients

Benefit program	Number of recipients	Estimated average individual amount paid annually	Estimated total amount paid annually
Veterans Pension	288,710	\$11,991	\$3,461,927,842
Survivors Pension	202,975	\$8,138	\$1,651,744,371
<b>Total</b>	<b>491,685</b>	<b>\$10,400</b>	<b>\$5,113,672,213</b>

<sup>1</sup> The term “survivors” includes surviving spouses and children



## Recipients by Period of Service



### New improved pension recipients by period of service

	Pre-World War I <sup>2</sup>	World War I	World War II	Korean Conflict	Vietnam Era	Gulf War Era
Veterans Pension			11,041	9,769	14,593	1,624
Survivors Pension	6	16	21,564	8,270	3,532	346
<b>Total</b>	<b>6</b>	<b>16</b>	<b>32,605</b>	<b>18,039</b>	<b>18,125</b>	<b>1,970</b>

### All improved pension recipients by period of service

	Pre-World War I <sup>3</sup>	World War I	World War II	Korean Conflict	Vietnam Era	Gulf War Era
Veterans			50,053	54,149	167,416	17,092
Survivors	92	2,416	128,795	43,502	26,294	1,876
<b>Total</b>	<b>92</b>	<b>2,416</b>	<b>178,848</b>	<b>97,651</b>	<b>193,710</b>	<b>18,968</b>

## Recipients and Amounts by Fiscal Year

### All recipients FY 2012 to FY 2016

Benefit program	2012	2013	2014	2015	2016	% Chg. FY 2015 to 2016
Veterans Pension	314,790	308,116	304,556	295,078	288,710	-2.2%
Survivors Pension	207,453	210,450	211,714	206,375	202,975	-1.7%
<b>Total</b>	<b>522,243</b>	<b>518,566</b>	<b>516,270</b>	<b>501,453</b>	<b>491,685</b>	<b>-2.0%</b>

### All recipients estimated average individual amount paid annually FY 2012 to FY 2016

Benefit Program	2012	2013	2014	2015	2016	% Chg. FY 2015 to 2016
Veterans Pension	\$11,038	\$11,315	\$11,682	\$11,977	\$11,991	0.1%
Survivors Pension	\$6,521	\$6,988	\$7,513	\$7,910	\$8,138	2.8%
<b>Total</b>	<b>\$9,243</b>	<b>\$9,559</b>	<b>\$9,973</b>	<b>\$10,303</b>	<b>\$10,400</b>	<b>0.9%</b>

<sup>2</sup> New to the rolls survivors of pre-World War I Veterans who served in the Spanish American War (6).

<sup>3</sup> On the rolls survivors of pre-World War I Veterans who served in the Spanish American War (83), the Mexican Border War (8) and the Civil War (1).



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## Veterans Pension Data

### New Veterans Pension recipients and estimated annual payments by type of pension

Type of pension	Number of Veterans	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>4</sup>	0	NA	NA
Improved Pension	37,027	\$13,858	\$ 513,114,950
<b>Total</b>	<b>37,027</b>	<b>\$13,858</b>	<b>\$ 513,114,950</b>

### New Veterans Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	19,607	53.0%	\$17,518	\$343,469,524
With housebound (HB)	208	0.6%	\$10,472	\$2,178,189
Total with A&A or HB <sup>5</sup>	19,815	53.5%	\$17,444	\$345,647,713
Total without A&A or HB	17,212	46.5%	\$9,730	\$167,467,237
<b>Total all</b>	<b>37,027</b>	<b>100%</b>	<b>\$13,858</b>	<b>\$ 513,114,950</b>

### New Veterans Pension recipients and estimated annual payments by gender

Gender	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	33,358	90.1%	\$13,837	\$461,563,254
Female Veterans	1,487	4.0%	\$13,581	\$20,194,545
Gender not indicated	2,182	5.9%	\$14,371	\$31,357,152
<b>Total</b>	<b>37,027</b>	<b>100%</b>	<b>\$13,858</b>	<b>\$ 513,114,950</b>

<sup>4</sup> The "Other Pension" category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.

<sup>5</sup> A subtotal of all beneficiaries with aid and attendance or housebound – used in all tables concerning special monthly pension.





### All Veterans Pension recipients and estimated annual payments by type of pension

Type of pension	Number of Veterans	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>6</sup>	1,328	\$1,700	\$2,257,958
Improved Pension	287,382	\$12,039	\$3,459,669,884
<b>Total</b>	<b>288,710</b>	<b>\$11,991</b>	<b>\$ 3,461,927,842</b>

### All Veterans Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	116,497	40.4%	\$16,544	\$1,927,373,257
With housebound (HB)	5,442	1.9%	\$9,986	\$54,344,283
Total with A&A or HB	121,939	42.2%	\$16,252	\$1,981,717,539
Total without A&A or HB	166,771	57.8%	\$8,876	\$1,480,210,303
<b>Total all</b>	<b>288,710</b>	<b>100%</b>	<b>\$11,991</b>	<b>\$3,461,927,842</b>

### All Veterans Pension recipients and estimated annual payments by gender

Gender	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	266,186	92.2%	\$11,931	\$3,175,806,141
Female Veterans	12,132	4.2%	\$12,616	\$153,052,283
Gender not indicated	10,392	3.6%	\$12,805	\$133,069,418
<b>Total</b>	<b>288,710</b>	<b>100%</b>	<b>\$11,991</b>	<b>\$ 3,461,927,842</b>

<sup>6</sup> The "Other Pension" category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.





## New Veterans Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>7</sup>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	With aid and attendance (A&A)	17,487	52.4%	\$17,517	\$306,324,175
	With housebound (HB)	180	0.5%	\$10,717	\$1,929,084
	Total with A&A or HB	17,667	53.0%	\$17,448	\$308,253,259
	Total without A&A or HB	15,691	47.0%	\$9,771	\$153,309,994
	<b>Total</b>	<b>33,358</b>	<b>100%</b>	<b>\$13,837</b>	<b>\$ 461,563,254</b>

Female Veterans	With aid and attendance (A&A)	783	52.7%	\$16,981	\$13,296,280
	With housebound (HB)	19	1.3%	\$8,271	\$157,149
	Total with A&A or HB	802	53.9%	\$16,775	\$13,453,429
	Total without A&A or HB	685	46.1%	\$9,841	\$6,741,116
	<b>Total</b>	<b>1,487</b>	<b>100%</b>	<b>\$13,581</b>	<b>\$20,194,545</b>

## All Veterans Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>7</sup>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	With aid and attendance (A&A)	105,127	39.5%	\$ 16,498	\$1,734,396,138
	With housebound (HB)	5,078	1.9%	\$ 10,026	\$ 50,910,260
	Total with A&A or HB	110,205	41.4%	\$16,200	\$1,785,306,398
	Total without A&A or HB	155,981	58.6%	\$8,915	\$1,390,499,743
	<b>Total</b>	<b>266,186</b>	<b>100%</b>	<b>\$11,931</b>	<b>\$ 3,175,806,141</b>

Female Veterans	With aid and attendance (A&A)	5,586	46.0%	\$16,489	\$92,107,437
	With housebound (HB)	229	1.9%	\$9,814	\$2,247,350
	Total with A&A or HB	5,815	47.9%	\$16,226	\$94,354,787
	Total without A&A or HB	6,317	52.1%	\$9,292	\$58,697,497
	<b>Total</b>	<b>12,132</b>	<b>100%</b>	<b>\$12,616</b>	<b>\$153,052,283</b>



## New Veterans Pension recipients and estimated annual payments by period of service

Period of service	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
World War II	11,041	29.8%	\$17,926	\$197,924,863
Korean Conflict	9,769	26.4%	\$15,841	\$154,747,962
Vietnam Era	14,593	39.4%	\$9,601	\$140,101,237
Gulf War Era	1,624	4.4%	\$12,525	\$20,340,888
<b>Total</b>	<b>37,027</b>	<b>100%</b>	<b>\$13,858</b>	<b>\$513,114,950</b>

## All Veterans Pension recipients and estimated annual payments by period of service

Period of service	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
World War II	50,053	17.3%	\$15,921	\$796,884,541
Korean Conflict	54,149	18.8%	\$12,597	\$682,124,308
Vietnam Era	167,416	58.0%	\$10,514	\$1,760,165,345
Gulf War Era	17,092	5.9%	\$13,033	\$222,753,649
<b>Total</b>	<b>288,710</b>	<b>100%</b>	<b>\$11,991</b>	<b>\$3,461,927,842</b>

## Chart: New compared to all Veterans Pension recipients by period of service

The chart below displays the distribution of the number of Veterans by period of service. The purple bars in the top row are new recipients and the brown/tan bars on the bottom row indicate all Veterans receiving pension benefits at the end of the fiscal year.





## New Veterans Pension recipients and estimated annual payments by age

Age range	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 34 and under	133	0.4%	\$12,792	\$1,701,288
Age 35 through 64	6,319	17.1%	\$11,116	\$70,244,438
Age 65 through 74	8,523	23.0%	\$8,447	\$71,995,358
Age 75 and over	22,052	59.6%	\$16,741	\$369,173,866
<b>Total</b>	<b>37,027</b>	<b>100%</b>	<b>\$13,858</b>	<b>\$513,114,950</b>

## All Veterans Pension recipients and estimated annual payments by age

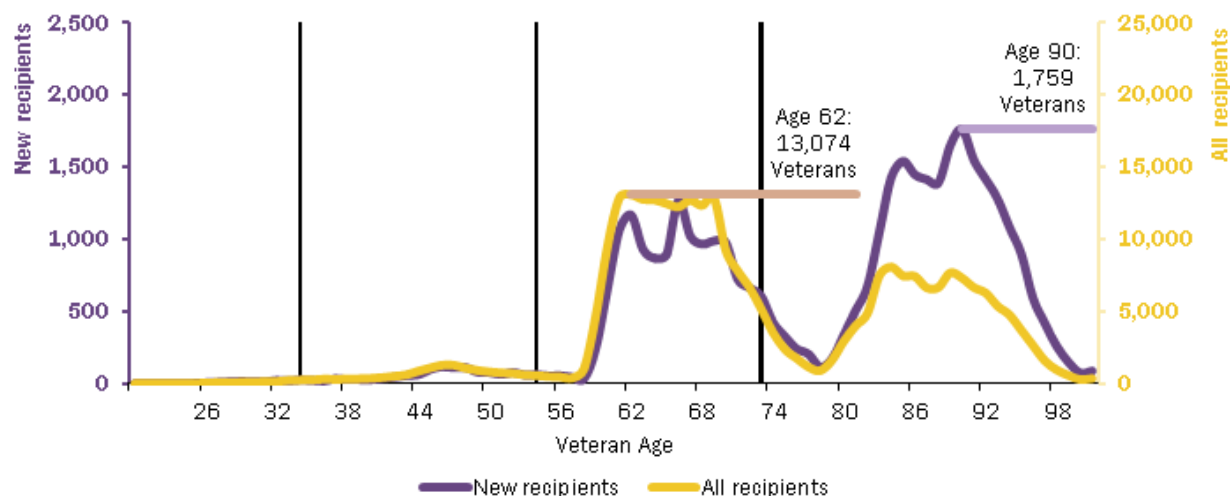
Age range	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 34 and under	1,091	0.4%	\$13,792	\$15,046,900
Age 35 through 64	81,194	28.1%	\$11,940	\$969,478,856
Age 65 through 74	95,003	32.9%	\$9,691	\$920,641,679
Age 75 and over	111,398	38.6%	\$13,972	\$1,556,480,615
<b>Total<sup>8</sup></b>	<b>288,710</b>	<b>100%</b>	<b>\$11,991</b>	<b>\$3,461,927,842</b>

<sup>8</sup> Total includes 24 Veterans and \$279,792 in benefits with no date of birth indicated in award record.



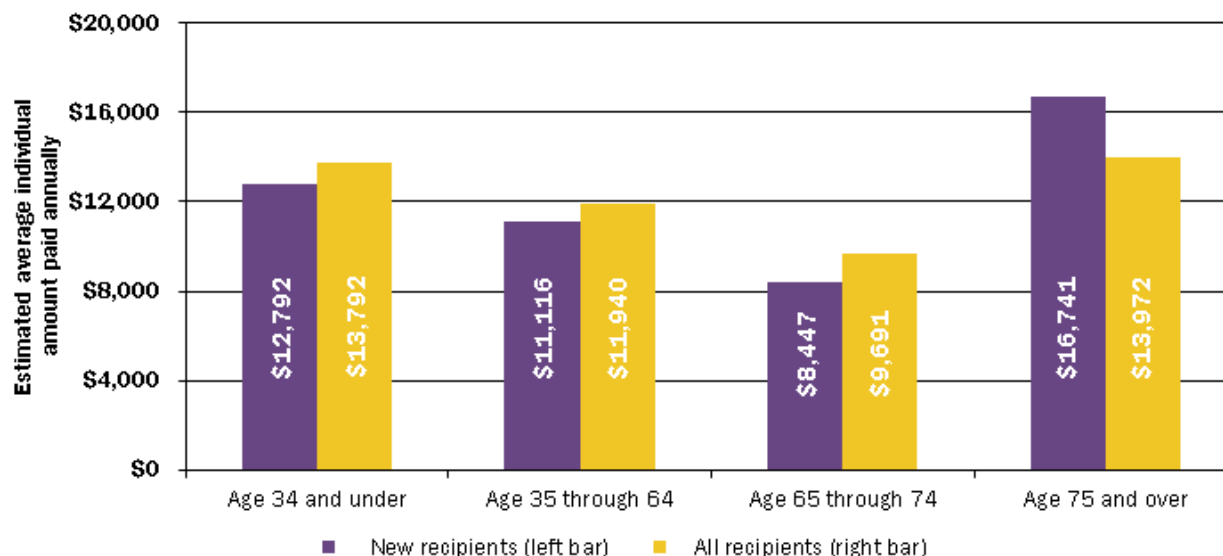
### Chart: New compared to all Veterans Pension recipients by age

The chart below displays the ages of the Veterans who began receiving benefits in FY 16 (purple line, left axis) vs. the total number of Veterans receiving benefits at the end of the fiscal year (tan line, right axis).



### Chart: New compared to all Veterans Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to Veterans who began receiving benefits in FY 16 (purple bars on the left) vs. the estimated average individual amount paid annually for all Veterans receiving benefits at the end of the fiscal year (tan bars on the right) by age group.





## Survivors Pension Data<sup>9</sup>

### New Survivors Pension recipients and estimated annual payments by type of pension

Type of pension	Number of survivors	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>10</sup>	0	NA	NA
Improved Pension	33,734	\$10,750	\$362,656,573
<b>Total</b>	<b>33,734</b>	<b>\$10,750</b>	<b>\$362,656,573</b>

### New Survivors Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	29,371	87.1%	\$11,517	\$338,261,974
With housebound (HB)	91	0.3%	\$6,786	\$617,537
Total with A&A or HB <sup>11</sup>	29,462	87.3%	\$11,502	\$338,879,511
Total without A&A or HB	4,272	12.7%	\$5,566	\$23,777,062
<b>Total all</b>	<b>33,734</b>	<b>100%</b>	<b>\$10,750</b>	<b>\$362,656,573</b>

### New Survivors Pension recipients and estimated annual payments by gender

Gender	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	83	0.2%	\$11,202	\$929,748
Female survivors	29,483	87.4%	\$10,853	\$319,977,899
Gender not indicated	4,168	12.4%	\$10,017	\$41,748,926
<b>Total</b>	<b>33,734</b>	<b>100%</b>	<b>\$ 10,750</b>	<b>\$362,656,573</b>

<sup>9</sup> The term “survivors” throughout this section includes surviving spouses and children.

<sup>10</sup> The “Other Pension” category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.

<sup>11</sup> A subtotal of all beneficiaries with aid and attendance or housebound – used in all tables concerning special monthly pension.





### All Survivors Pension recipients and estimated annual payments by type of pension

Type of pension	Number of survivors	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>12</sup>	13,279	\$973	\$12,921,999
Improved Pension	189,696	\$8,639	\$1,638,822,372
<b>Total</b>	<b>202,975</b>	<b>\$8,138</b>	<b>\$1,651,744,371</b>

### All Survivors Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	126,546	62.3%	\$10,441	\$1,321,211,801
With housebound (HB)	1,274	0.6%	\$5,499	\$7,006,213
<b>Total with A&amp;A or HB</b>	<b>127,820</b>	<b>63.0%</b>	<b>\$10,391</b>	<b>\$1,328,218,014</b>
<b>Total without A&amp;A or HB</b>	<b>75,155</b>	<b>37.0%</b>	<b>\$4,305</b>	<b>\$323,526,358</b>
<b>Total all</b>	<b>202,975</b>	<b>100%</b>	<b>\$8,138</b>	<b>\$1,651,744,371</b>

### All Survivors Pension recipients and estimated annual payments by gender

Gender	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	1,392	0.7%	\$2,424	\$3,374,256
Female survivors	145,555	71.7%	\$8,885	\$1,293,240,900
Gender not indicated	56,028	27.6%	\$6,338	\$355,129,215
<b>Total</b>	<b>202,975</b>	<b>100%</b>	<b>\$8,138</b>	<b>\$1,651,744,371</b>

<sup>12</sup> The "Other Pension" category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.





## New Survivors Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>13</sup>

	Special monthly pension status	Number of survivors	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	With aid and attendance (A&A)	39	47.0%	\$12,641	\$492,996
	With housebound (HB)	0	0.0%	NA	NA
	Total with A&A or HB	39	47.0%	\$12,641	\$492,996
	Total without A&A or HB	44	53.0%	\$9,926	\$436,752
	<b>Total</b>	<b>83</b>	<b>100%</b>	<b>\$11,202</b>	<b>\$929,748</b>

Female survivors	With aid and attendance (A&A)	26,028	88.3%	\$11,544	\$300,468,523
	With housebound (HB)	80	0.3%	\$6,732	\$538,565
	Total with A&A or HB	26,108	88.6%	\$11,529	\$301,007,088
	Total without A&A or HB	3,375	11.4%	\$5,621	\$18,970,811
	<b>Total</b>	<b>29,483</b>	<b>100%</b>	<b>\$10,853</b>	<b>\$319,977,899</b>

## All Survivors Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>13</sup>

	Special monthly pension status	Number of survivors	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	With aid and attendance (A&A)	141	10.1%	\$10,253	\$1,445,640
	With housebound (HB)	1	0.1%	\$10,548	\$10,548
	Total with A&A or HB	142	10.2%	\$10,255	\$1,456,188
	Total without A&A or HB	1,250	89.8%	\$1,534	\$1,918,068
	<b>Total</b>	<b>1,392</b>	<b>100%</b>	<b>\$2,424</b>	<b>\$3,374,256</b>

Female survivors	With aid and attendance (A&A)	101,814	69.9%	\$10,579	\$1,077,093,605
	With housebound (HB)	1,029	0.7%	\$5,496	\$5,655,889
	Total with A&A or HB	102,843	70.7%	\$10,528	\$1,082,749,494
	Total without A&A or HB	42,712	29.3%	\$4,928	\$210,491,406
	<b>Total</b>	<b>145,555</b>	<b>100%</b>	<b>\$8,885</b>	<b>\$ 1,293,240,900</b>



## New Survivors Pension recipients and estimated annual payments by period of service

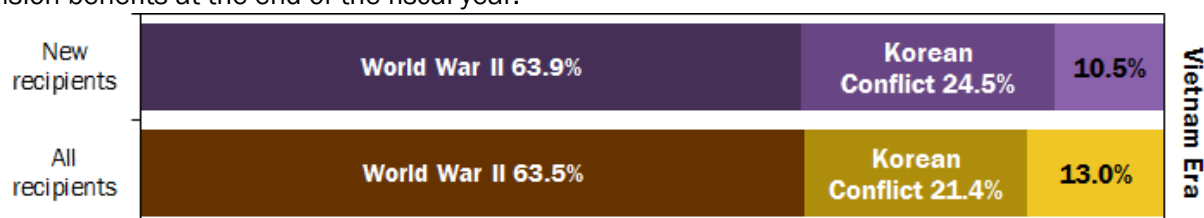
Veteran's period of service	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Pre-World War I	6	0.0%	\$4,164	\$24,984
World War I	16	0.0%	\$9,680	\$154,872
World War II	21,564	63.9%	\$11,240	\$242,374,704
Korean Conflict	8,270	24.5%	\$10,599	\$87,656,005
Vietnam Era	3,532	10.5%	\$8,507	\$30,047,383
Gulf War Era	346	1.0%	\$6,932	\$2,398,624
<b>Total</b>	<b>33,734</b>	<b>100%</b>	<b>\$10,750</b>	<b>\$362,656,573</b>

## All Survivors Pension recipients and estimated annual payments by period of service

Veteran's period of service	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Pre-World War I	92	0.0%	\$3,022	\$278,059
World War I	2,416	1.2%	\$3,057	\$7,385,550
World War II	128,795	63.5%	\$8,369	\$1,077,902,036
Korean Conflict	43,502	21.4%	\$8,042	\$349,858,589
Vietnam Era	26,294	13.0%	\$7,694	\$202,306,107
Gulf War Era	1,876	0.9%	\$7,470	\$14,014,030
<b>Total</b>	<b>202,975</b>	<b>100%</b>	<b>\$8,138</b>	<b>\$1,651,744,371</b>

### Chart: New compared to all Survivors Pension recipients by Veteran's period of service<sup>14</sup>

The chart below displays the distribution of the number of survivors by the Veteran's period of service. The purple bars in the top row are new recipients and the brown/tan bars on the bottom row indicate all survivors receiving pension benefits at the end of the fiscal year.



<sup>14</sup> Survivors of Veterans of the Gulf War Era, World War I and Pre-World War I do not make up a significant enough portion of the total to be visible on the chart.





## New Survivors Pension recipients and estimated annual payments by age

Age range	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 17 and under	88	0.3%	\$7,911	\$696,208
Age 18 through 34	106	0.3%	\$5,306	\$562,444
Age 35 through 64	2,083	6.2%	\$6,987	\$14,554,503
Age 65 through 74	1,453	4.3%	\$8,017	\$11,648,627
Age 75 and over	29,983	88.9%	\$11,171	\$334,941,087
<b>Total<sup>15</sup></b>	<b>33,734</b>	<b>100%</b>	<b>\$10,750</b>	<b>\$362,656,573</b>

## All Survivors Pension recipients and estimated annual payments by age

Age range	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 17 and under	178	0.1%	\$5,543	\$986,734
Age 18 through 34	350	0.2%	\$5,517	\$1,931,106
Age 35 through 64	26,259	12.9%	\$6,272	\$164,705,018
Age 65 through 74	17,796	8.8%	\$5,398	\$96,068,526
Age 75 and over	157,909	77.8%	\$8,762	\$1,383,585,084
<b>Total<sup>16</sup></b>	<b>202,975</b>	<b>100%</b>	<b>\$8,138</b>	<b>\$1,651,744,371</b>

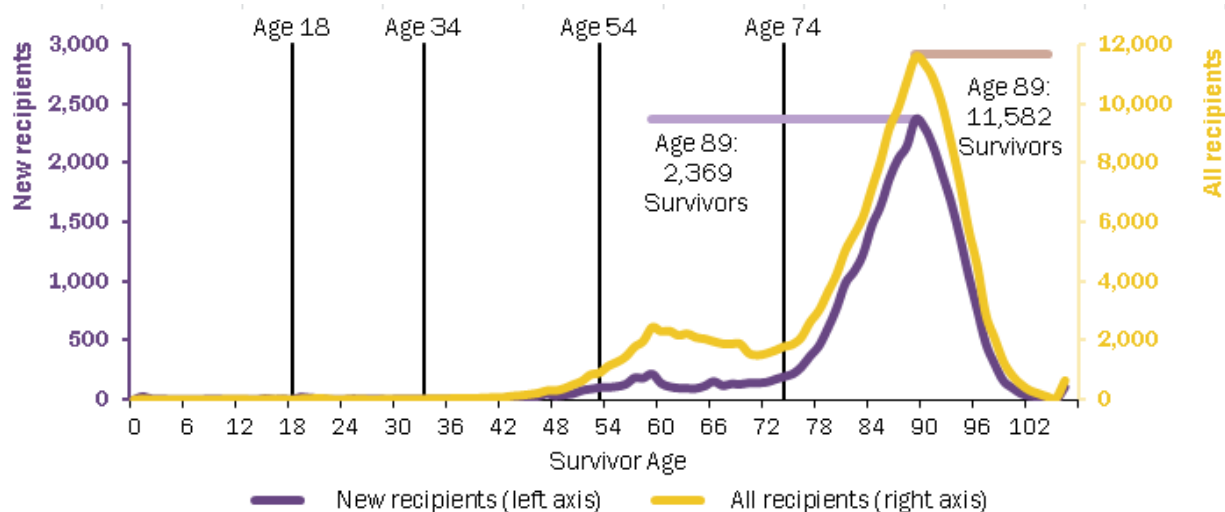
<sup>15</sup> Total includes 21 survivors and \$253,704 in benefits with no date of birth indicated in award record.

<sup>16</sup> Total includes 483 survivors and \$4,467,904 in benefits with no date of birth indicated in award record.



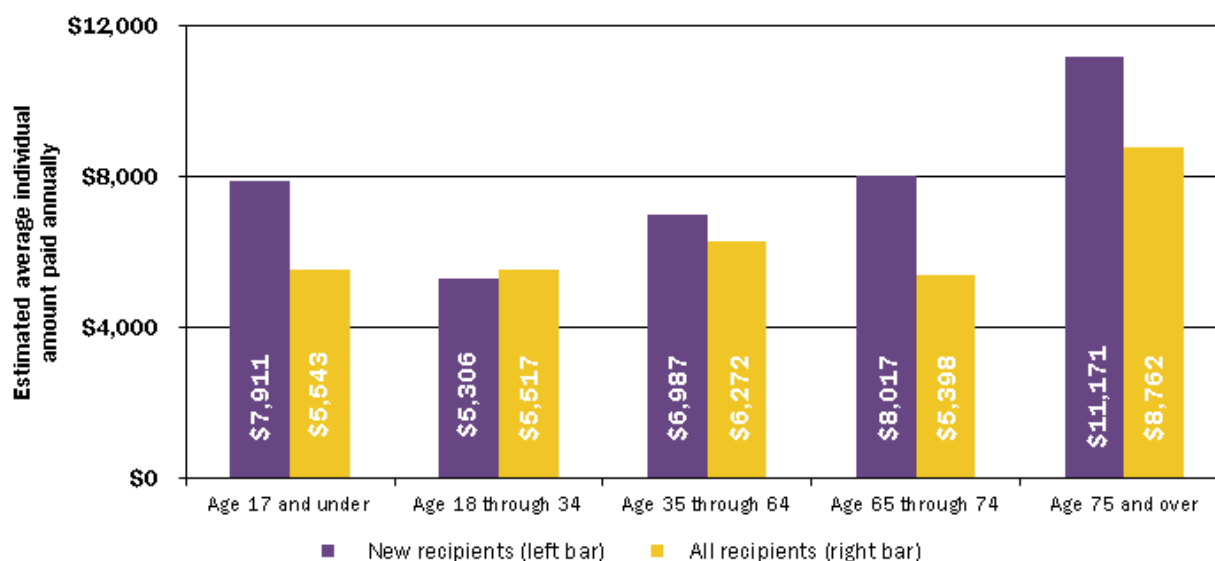
### Chart: New compared to all Survivors Pension recipients by age

The chart below displays the ages of the survivors who began receiving benefits in FY 16 (purple line, left axis) vs. the total number of survivors receiving benefits at the end of the fiscal year (tan line, right axis).



### Chart: New compared to all Survivor Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to survivors who began receiving benefits in FY 16 (purple bars on the left) vs. the estimated average individual amount paid annually for all survivors receiving benefits at the end of the fiscal year (tan bars on the right) broken down by age.





# Fiduciary

## Purpose of the Fiduciary Program



VA's Fiduciary Program provides protection to Veterans and other beneficiaries who are unable to manage their financial affairs. Under this program, VA appoints fiduciaries to manage VA benefits and ensure the welfare and needs of beneficiaries by using the least restrictive, yet most effective payment method. The program closely monitors fiduciaries for compliance with program responsibilities to ensure that VA benefits are being used for the sole purpose of meeting the needs, security, and comfort of beneficiaries and their dependents.

Beginning with fiscal year 2015, Fiduciary Program totals represent the number of beneficiaries served during the fiscal year.

### Number of beneficiaries by beneficiary type<sup>17</sup>

Beneficiary Type	Number of Beneficiaries
Veteran	134,256
Surviving spouse	83,508
Adult disabled child	13,041
Minor child <sup>18</sup>	2,584
Dependent parent	84
<b>Total<sup>19</sup></b>	<b>233,473</b>

### Amount of benefits managed by benefit type<sup>20</sup>

Benefit Paid	Estimated total amount paid annually	Estimated average individual amount paid annually
Compensation	\$1,864,659,632	\$30,296
Veterans Pension	\$700,570,103	\$13,025
Survivors Pension	\$577,114,807	\$7,866
Dependency and Indemnity Compensation	\$121,356,420	\$15,379
<b>Total</b>	<b>\$3,263,700,963</b>	

<sup>17</sup> Source: Beneficiary Fiduciary Field System

<sup>18</sup> Includes minors in receipt of one-time insurance awards due to being named a beneficiary on an insurance policy.

<sup>19</sup> Includes any beneficiary who received services from VA's fiduciary program during FY 16.

<sup>20</sup> Source: VBA corporate database





### Number of beneficiaries by fiduciary relationship<sup>17</sup>

Relationship	Number of Beneficiaries
Legal Custodian	158,069
Spouse Payee	25,307
Court Appointed Fiduciary	6,140
Supervised Direct Pay	6,826
Institutional Award	2,024
Custodian in Fact	29
Superintendent of Indian Reservation	25
Proposed Fiduciary <sup>21</sup>	35,053
<b>Total</b>	<b>233,473</b>

### Misuse

During fiscal year 2016, fiduciary personnel conducted 1,487 misuse investigations of which 764 fiduciaries were removed based upon a finding of misuse of benefits. Of the cases VA referred to the VA Office of the Inspector General (OIG), 58 misuse cases were accepted by OIG for further investigation.

OIG reported the following actions have been taken<sup>22</sup>:

- Investigations opened: 58
- Investigations completed and referred to prosecutor's office: 41
- Cases accepted for prosecution: 10
- Cases declined for prosecution: 20
- Cases pending: 11

The number of OIG prosecutorial outcomes during fiscal year 2016<sup>22</sup>:

- Arrests: 16
- Indictments: 19
- Convictions: 15

The amount of funds involved in OIG prosecutorial outcomes during fiscal year 2016:

- The total amount of restitution ordered in cases arising from the misuse of benefits by a fiduciary was \$643,052<sup>23</sup>.
- The total amount of money recovered by the government in misuse cases was \$215,133<sup>18</sup>.
- The total amount of benefits reissued to beneficiaries was \$2,322,392<sup>17</sup>.

<sup>21</sup> Includes beneficiaries awaiting the final determination of incompetency and/or the appointment of a fiduciary.

<sup>22</sup> Includes action taken by OIG on cases referred as of the end of fiscal year 2016. Figures may include cases referred during previous fiscal years.

<sup>23</sup> Source: OIG



## Appendix – Fiduciary Hub Addresses and Regional Offices Served

### Salt Lake City – UT VA Fiduciary Hub

P.O. Box 58086

Salt Lake City, UT 84158

Regional offices served:

Salt Lake City	UT
Albuquerque	NM
Los Angeles	CA
Anchorage	AK
Oakland	CA
Boise	ID
Phoenix	AZ
Cheyenne	WY
Portland	OR
Denver	CO
Reno	NV
Ft. Harrison	MT
Honolulu	HI
San Diego	CA
Seattle	WA

### Lincoln – NE VA Fiduciary Hub

P.O. Box 5444

Lincoln, NE 68505-5444

Regional offices served:

Lincoln	NE
Wichita	KS
Sioux Falls	SD
Muskogee	OK
Fargo	ND
Waco	TX
Houston	TX

### Milwaukee – WI VA Fiduciary Hub

P.O. Box 14975

Milwaukee, WI 53214-0975

Regional offices served:

Milwaukee	WI
Little Rock	AR
Des Moines	IA
St. Louis	MO
St. Paul	MN
New Orleans	LA
Chicago	IL

### Louisville – KY VA Fiduciary Hub

P.O. Box 3487

Louisville, KY 40201

Regional offices served:

Louisville	KY
Roanoke	VA
Huntington	WV
Jackson	MS
Nashville	TN
Montgomery	AL
San Juan	PR

### Indianapolis – IN VA Fiduciary Hub

P.O. Box 441780

Indianapolis, IN 46204

Regional offices served:

Indianapolis	IN
Detroit	MI
Newark	NJ
Baltimore	MD
Manchester	NH
White River	
Junction	VT
Boston	MA
Pittsburgh	PA
Philadelphia	PA
Wilmington	DE
Hartford	CT
New York	NY
Providence	RI
Buffalo	NY
Togus	ME
Cleveland	OH

### Columbia – SC VA Fiduciary Hub

P.O. Box 9367

Columbia, SC 29209-9998

Regional offices served:

Columbia	SC
Winston-Salem	NC
Atlanta	GA
St. Petersburg	FL

**The Manila Regional Office  
oversees all fiduciary matters in  
the Philippines.**

Fiduciary Hub Call Center:

**1-888-407-0144**



U.S. Department  
of Veterans Affairs  
Veterans Benefits  
Administration



## Appendix – Pension Management Center Addresses and Regional Offices Served

### Philadelphia – PA Pension Management Center

P.O. Box 8079  
Philadelphia, PA 19101

#### Regional offices served:

Hartford	CT
Wilmington	DE
St. Petersburg	FL
Atlanta	GA
Boston	MA
Baltimore	MD
Togus	ME
Winston-Salem	NC
Manchester	NH
Newark	NJ
Buffalo	NY
New York	NY
Philadelphia	PA
Pittsburgh	PA
San Juan	PR
Providence	RI
Columbia	SC
Roanoke	VA
White River	
Junction	VT
Huntington	WV

### Milwaukee – WI Pension Management Center

P.O. Box 342000  
Milwaukee, WI 53234-9907

#### Regional offices served:

Montgomery	AL
Little Rock	AR
Chicago	IL
Indianapolis	IN
Louisville	KY
New Orleans	LA
Detroit	MI
St. Louis	MO
Jackson	MS
Cleveland	OH
Nashville	TN
Milwaukee	WI

### St. Paul – MN Pension Management Center

P.O. Box 11000  
Fort Snelling St. Paul, MN 55111-0000

#### Regional offices served:

Anchorage	AK
Phoenix	AZ
Los Angeles	CA
Oakland	CA
San Diego	CA
Denver	CO
Honolulu	HI
Des Moines	IA
Boise	ID
Wichita	KS
St. Paul	MN
Ft. Harrison	MT
Fargo	ND
Lincoln	NE
Albuquerque	NM
Reno	NV
Muskogee	OK
Portland	OR
Sioux Falls	SD
Houston	TX
Waco	TX
Salt Lake City	UT
Seattle	WA
Cheyenne	WY

**The Manila Regional Office  
processes all pension claims in  
the Philippines.**

National Pension Call Center:

**1-877-294-6380**



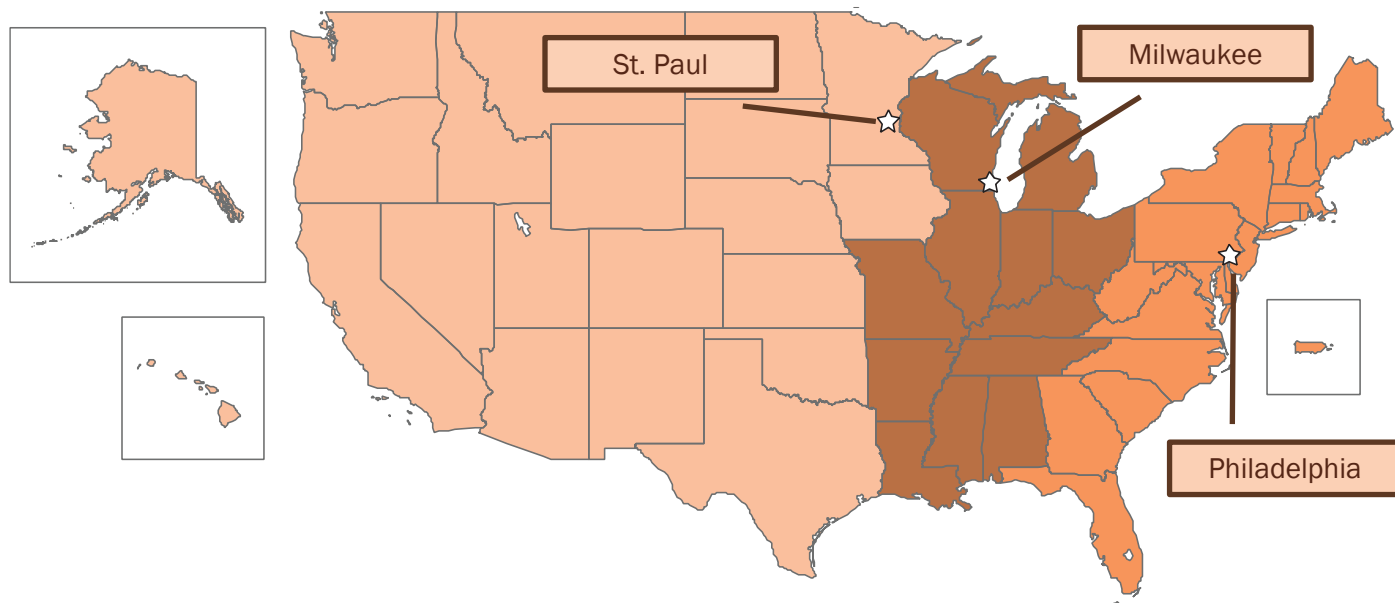
**VA**



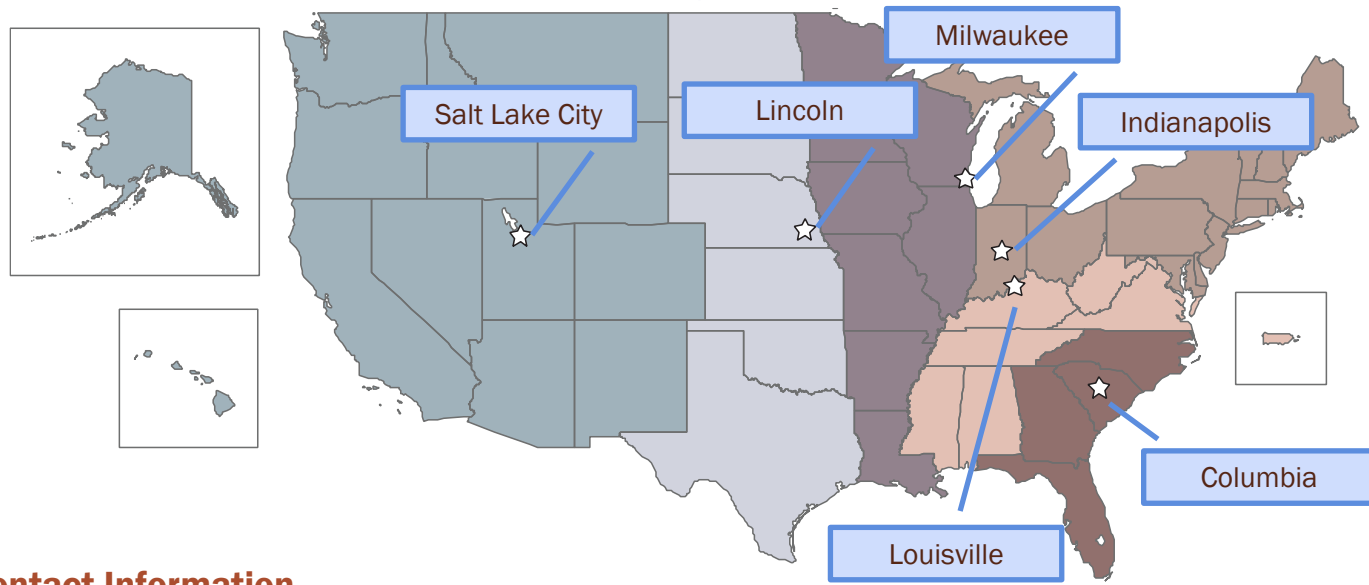
U.S. Department  
of Veterans Affairs  
Veterans Benefits  
Administration

## Appendix – Maps of Fiduciary Hub and Pension Management Center Jurisdiction

### Pension Management Centers



### Fiduciary Hubs



### Contact Information

Pension Information:  
**1-877-294-6380**

Fiduciary Information:  
**1-888-407-0144**

Annual Benefits Report  
(Office of Performance  
Analysis & Integrity)  
**202-461-9040**

Department of Veterans Affairs  
home page  
**[www.va.gov](http://www.va.gov)**

Veterans Benefits Administration  
home page  
**[benefits.va.gov](http://benefits.va.gov)**

Pension home page  
**[benefits.va.gov/pension](http://benefits.va.gov/pension)**

Fiduciary home page  
**[benefits.va.gov/fiduciary](http://benefits.va.gov/fiduciary)**

eBenefits  
(Online forms and applications)  
**[www.ebenefits.va.gov](http://www.ebenefits.va.gov)**



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